

June Tip of the Month:

Creating a letter template

Did you know that you can create a new letter template in Great Plains version 8 that can include company, customer, vendor, or employee address information, and also customer balance and invoice detail information from Great Plains.

To create a letter template:

- Open the Letter Writing Assistant.
(Reports >> Letter Writing Assistant)
- A welcome message will be displayed. Choose Next to continue.
- Mark the Customize the letters by adding new letters or changing existing letters option. Choose Next to continue.
- Select the letter category for the letter template that you're creating.
- Select the Create a New Letter option.
- Select whether to start with a blank document or with an existing Word document.
- Choose Next to continue. A window will open. Depending on what you select, complete one of the following actions.
- If you selected to start with a blank document, enter the name to use for the template and choose OK.
- If you selected to start with an existing Word document, enter or select the path and file name of the document to use and choose OK.
- The blank or existing Word document will open in Word. A letter-writing toolbar that you can use to add Great Plains data to the letter will open.
- Select the insertion point where you'd like data from Great Plains to be placed in the letter, and then select the type of data to add to the letter using the letter-writing toolbar.
- Choose File >> Save to save the document as a new letter template.
- When you've finished and you close Word, the Letter Writing Assistant will remain open in Great Plains so that you can continue working with letter templates.

Filename: Document1
Directory:
Template: C:\Documents and Settings\rchronin\Application
Data\Microsoft\Templates\Normal.dot
Title:
Subject:
Author: administrator
Keywords:
Comments:
Creation Date: 5/16/2005 12:51 PM
Change Number: 1
Last Saved On:
Last Saved By:
Total Editing Time: 0 Minutes
Last Printed On: 5/16/2005 12:51 PM
As of Last Complete Printing
Number of Pages: 1
Number of Words: 242 (approx.)
Number of Characters: 1,383 (approx.)